

**AUTOMATED SERVICES COMMITTEE
MINUTES**

June 24, 2003

PRESENT (voting): Tim Burke (APLM); Nancy Pieri (BETH); Joe Makowiec (BRUN); Barbara Nichols Randall (GUIL); Sharon Hodges (PTRB); Judy Felsten (RCS); Barbara Kubli (STEP); Carol Reppard (TROY); Rob Carle (UHLS); Lorraine Smi (VOOR)

(Non-voting): Rawdon Cheng, Sara Dallas, Jonathan Koppel, Marcia Middleton, Geoffrey Kirkpatrick

9:00 a.m. – Meeting called to order by P. Ritter, Chair.

I. MINUTES

Minutes of the June 3, 2003, meeting were accepted as written.

II. AUTOMATION SERVICES REPORT - Karen Nuckolls

Her report had been sent out in advance of the meeting.

B. Kubli asked if R. Carle could remove block deletions. He can remove some himself and others he sends on to Dynix. Blocks with the dates 1/10/03, 1/23/03 and 1/24/03 are from the gap load and are difficult to delete.

III. TECHNOLOGY SERVICES REPORT - Rawdon Cheng

His report had been sent out in advance of the meeting.

R. Cheng asked for ASC permission to experiment with browse scoping. The system has been stable for several days and he would like to turn on the browse scoping function on Thursday and see if it will affect system operations at all. By Wednesday, all of the libraries will have been linked to UHLS' new T1 line. He will send out an email notifying everyone that on Thursday, the browse scoping will be activated and monitored. Anyone experiencing Horizon slow downs will be asked to notify him immediately.

B. Nichols Randall asked if Dynix knows why browse scoping has not worked up until now? She expressed reservations about turning it on at this time. R. Cheng - Dynix doesn't know why it hasn't worked, but there is a possibility that it was due to system instability. If it causes a problem when it is turned on, it can be turned off right away and at least he will know that this is the function causing a problem.

MOTION: B. Kubli moved to allow the UHLS staff to test the browse scoping function. D. Canzano second. AYES: 9; NAYS: 1 (B. Nichols Randall) MOTION PASSED.

Discussion regarding a recent iPac problem. It was due to faulty data synchronization and has been fixed.

R. Cheng noted that the 7.24 upgrade has been sent out to several libraries. Those who have not installed the upgrade will probably wait until the 7.3 release is available. Discussion regarding 7.3. Consensus to wait and see how 7.3 functions for other organizations. The issue will be tabled for discussion at the July 11th meeting.

R. Cheng reported that, as stated in Rider E #2 of the UHLAN contract, libraries will have the capability to notify patrons if the item that they have requested has become nonrequestable (i.e. has been damaged, lost or is missing). How do libraries want to receive this information in order to notify these patrons - by paper notices or in email? Paper notices cost 8¢ each; email is free. Consensus that R. Cheng will contact each of the libraries, initially via email, to find out their preferences. P. Ritter suggested that R. Cheng should call any libraries that have not responded to his email announcement.

IV. DYNIX CONCERNS

Request parameters for priority requests: libraries want to make sure that their patrons are the first ones on the list for the home library's items. Jeff Olsen, from Dynix, made changes in the system to allow this to happen but these changes have now slowed down the whole request process. Discussion - should this type of request only apply to certain items? M. Middleton suggested that they should remove item types that are not new and this might help make the system easier to use and speed it up.

MOTION: B. Kubli moved that the request parameters for priority requests should be changed to include only those items that are new. J. Makowiec second. Unanimous.

R. Carle will follow-up with Dynix on these parameters.

LinkSys routers: it has been determined that the LinkSys routers are causing some of the time-out problems. Libraries using the LinkSys brand need to replace them (or only using them as switches, rather than routers). He will make a group purchase and pre-configure the routers for all of the libraries that need to make this change.

SPAM discussion: J. Koppel noted that there is some difficulty in filtering the SPAM email at the server level. It is possible for each email recipient to set up their email preferences to filter out what they consider to be SPAM.

MOTION: T. Burke moved that UHLS discontinue filtering for SPAM purposes, but to continue filtering for viruses. UHLS should also recommend the appropriate tools and provide training for filtering at the individual email account-level. J. Felsten second.

J. Makowiec offered an amendment to the motion to the effect that UHLS would continue passive filtering which would tag emails that were considered SPAM and this would alert the client filters to look for that tag. Amendment accepted.

Unanimous. Motion passed.

Dynix representative at July meeting: P. Ritter reported that Julian Critchfield, from Dynix, will attend the July 11th joint meeting of the ASC and the Directors Association. B. Nichols Randall wanted the DYNIX report to review prior to this meeting in order to determine topics for the discussion. An "Unresolved Issues" list should be developed prior to the meeting.

Dynix problems: due to the resignation of Karen Nuckolls, any Horizon problems should be sent to R. Carle. He will either fix it, forward to R. Cheng, or send on to the correct person at Dynix.

Reports: R. Cheng noted that UHLS will prepare a monthly statistical report and asked the libraries what items should be included.
Discussion.

MOTION: N. Pieri moved that the following categories should be included in the monthly statistical report: Adult fiction, Juvenile fiction, YA fiction, Adult nonfiction, Juvenile nonfiction, YA nonfiction, Adult periodicals, Juvenile periodicals, YA periodicals, Adult videos, Adult audios, Juvenile videos, Juvenile audios, and miscellaneous. B. Nichols Randall second. Unanimous.

Borrower registration: Discussion regarding the information to be entered in the "location box" on the borrower registration screen. Consensus to send this issue, via R. Carle, to the Resource Sharing Advisory Council.

Telecirc: N. Pieri sent a list of questions regarding this function to J. Koppel. He will be following up on it.

V. MANAGER, AUTOMATION SERVICES

P. Ritter reported that he will be scheduling a meeting with Directors and Technology Staff to brainstorm about the requirements for this position. He will also be establishing a Search Committee that will assist in advertising for the position, reviewing applications and conducting interviews.

11:05 AM meeting adjourned.

NEXT MEETING: Friday, July 11th at 9:00 AM. Joint meeting with the Directors Association.

NOTE: July 22nd meeting has been canceled.

Heidi A. Fuge
6/25/03

**Technology Service Dept
Monthly Report for the ASC
June 24, 2003**

BLOCK PROCESS CAUSING SLOWDOWN

Since the beginning of June, we have logged less and less block processes. We do not know what changes, if any, has made been to make this happen. Overall, the system is more stable.

CRASHES CAUSED BY IDLING

Most RR/DSL libraries are still having crashes caused by idling. We have determined that it was caused by the Linksys router. Linksys technical support cannot give us an answer why it happens nor suggestions that correct the problem. Four libraries at this time are using different brand routers and they experience no crashes: Cisco at Brunswick, Dlink at Watervliet, Sonicwall at Poestenskill, and C/N at Cohoes. BRUN is using a loaner router installed by Dynix. Since last Wednesday (June 18), it has no occurrence of crashes. WTVT router is loaned from UHLS. The router has been used for more than a month and it poses no problem. The other two libraries own their routers and the routers have been in use for months. They experience no crash caused by idling.

Recommendation: Linksys router should be replaced by one of the 4 brands mentioned above as soon as possible.

UHLS INTERNET CONNECTION

RR did a bandwidth analysis on our Internet usage. It reported that we have utilized maximum upload bandwidth in the afternoons. That will cause substantial slow down on RR/DSL libraries connecting to Horizon. Since then (June 16), it has increased our bandwidth to 786kps but based on initial responses from some libraries, it did not increase their connection speed. Dynix changed our router configuration on the same day, to utilize our Fractional T to carry Horizon traffic. We have converted all RR/DSL libraries to use the new link. Nearly all users expressed they have much speedy response from the server. UHLS will monitor the bandwidth usage on the Fractional-T.

Some users have complained that ipac is very slow in displaying item details. We do not know it is a bandwidth

issue or a server issue. One way to test is putting ipac out of RR link. If the Fractional-T still have enough unused bandwidth, we will put ipac on that link.

DYNIX SITE VISITS

Kim Mayberry of Dynix is visiting all libraries from June 17 to June 25, to do network analysis. He will submit a report to UHLS when it is done.

EXCESS DELAY IN PLACING HOLDS

In the past two weeks, users have complained it takes much longer to place a hold. It is discovered that we have created additional 1400 exceptions in Request Table. The objective is to allow libraries to fill their own patron requests first. This is an issue we should discuss whether we should continue this practice.

REPORTS

We will be working on a monthly report to give statistics about number of new patrons registered during that month. It will also give total patrons registered for each location.

At the report workshop held in May, it was suggested that we should provide a report to give circ statistics based on ownership of items and cko locations. Eric Graham said he can supply us that report but he needs to know what kind of breakdown we need. Horizon does not collect those numbers so we have to capture our own. In the process, we can specify what kind of breakdown we use. I have posted a message on our Horizon Listserv but I only received two replies.

SPAM MAIL FILTERING POLICY

In the simplest terms, UHLS should not filter any email unless the email carries potential harmful material which will jeopardize the security of the recipient's computer, network or other computers.

Arguments:

1. UHLS is a consortium funded by the State of New York. We provide services to our members using state money. We should provide equal access to our customers.

2. Each member library operates independent from each other. Each member may have its own email policy. Spam filtering operates on the server level. We cannot enforce the rule if it contradicts any library policy.

3. UHLS does not "own" the email addressed to non-UHLS staff. Any filtering to those users is inappropriate. However, member libraries can filter their employees' email as needed.

4. Fighting spam is costly and ineffective. The spam filtering feature of our email application uses pattern matching algorithm to flag possible spam mail for further analysis. Since it is enabled, Jonathan has been spending nearly 25% of his time to manage the list, but spam mail are still going thru. Also, he estimates 5% of filtered mail are false-positive so users are not getting what they should get. His time will be better use to educate users to avoid getting their email address on spammers hands or teache users to create personal rules to filter our unwanted email.

Spam is a loosely defined term. Unless it is defined, it will be not be effective. And consider this: can you ask US Postal Service not to deliver junk mail to your home?

Recommendations: UHLS will stop filtering any email except it attaches certain file types (e.g. exe, bat, scp, vbs...)

OTHER ISSUES

Telecirc server is setup. Jonathan will work with a staff from Automation Dept to roll this service. They will seek opinions from libraries to set up policies.

Dynix is working on the Firewall now. I have given them specifications which tailor to our needs. I am working on a plan to roll this out. My target date is the end of June.

Submitted by Rawdon Cheng

AUTOMATION SERVICES DEPARTMENT REPORT**June 24, 2003****HORIZON IMPLEMENTATION****DYNIX TEAM VISITS**

During the week of June 2, four Dynix staff visited UHLS and several of our member libraries to study network problems with the hopes of coming to some solutions of why these have been occurring. Jeff Olsen, who works with Kathy Cunningham, our Migration Library Consultant, worked with Karen and Rob on some software issues, and at several of our libraries as well.

Some results: Rob has been shown how to create various Pac "flavors" to tailor searches to a library's preference. Karen has created library-specific item records so that member libraries can enter and edit their own. The default four-letter library code appears for each library and branch.

OTHER DYNIX ISSUES

The New Borrower screen in Circulation has had the Bstat entry changed back to the original way, due to unresolved (Dynix) problems with the split Bstats. Instructions on how to enter these can be found on the Intranet.

Call No. Istats: are being entered for all libraries. These are in for several, and soon all 37 will be completed, both for Adult and Juvenile (etc.) Nonfiction; and for media. When this has been entirely completed, you will be notified.

Training (Rob)

Rob continues to review Horizon workflow issues when member libraries request training. He has focused lately on fast-adding item and bibliographic records, and he would like to hear from libraries that wish to review this process. He also will interpret reports to members who did not participate in the reports workshop he conducted last month.

June 3rd, 4th, and 5th, Rob traveled to five member libraries with Patty Pray and Jeff Olsen from Dynix to investigate some of the major problems impacting Upper Hudson. The five libraries volunteered their facilities to undergo a series of tests to diagnose network problems. Jeff and Patty answered many questions from staff, and spent several hours at each of the libraries. GUIL, BETH, ALTM, BRUN, and PTRB were the five volunteer libraries, and Jeff Olsen was able to meet with Marcia Middleton from APLM on Friday morning before flying back to Provo, Utah.

Unresolved Issues

Dynix is currently working on several outstanding issues:

- ? Block Deletion — Problems in being unable to delete patron blocks (*STILL being worked on; Jeff Olsen says there is some correlation between using PC Reliance and blocks, but there are still others that are difficult to delete.*)
- ? Request Parameters entry — (*Jeff Olsen changed these while he was here, and after some setting problems, it seems to be working smoothly. We are waiting for release 7.3, which will contain the enhancement of "cluster holds" before making further changes.*)
- ? Withdrawn items — Since the "weeding program" this is supposed to be designed for is not due out until Release 7.3, Rawdon is currently working with Mark Derrick on a work-around.